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RESOURCE PUBLICATION No. 3

BUDGET COMMUNICATION STRATEGIES *1992*

April, 1992

ONTARIO PUBLIC SCHOOL BOARDS' ASSOCIATION

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RESOURCE PUBLICATION No. 3

Resource Publications are a series of publications designed to facilitate sharing of information, ideas and strategies among public school boards on key issues, topics and trends in public education. Your comments on Resource Publications and suggestions for future topics are welcome.

Please forward your comments and suggestions to:

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RESOURCE PUBLICATION No.1 provided communications suggestions and ideas for school boards to help explain 1990 budget and tax increases and funding issues. Published by the Ontario Public School Boards' Association, in April 1990.

RESOURCE PUBLICATION No.2 provided helpful suggestions for school boards and trustees as effective communicators to the public through the print and electronic media in both proactive and reactive situations. Published by the Ontario Public School Boards' Association, in November, 1991.

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93-00631/

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Acknowledgements

This publication was prepared with the assistance of:

Communications Department
Carleton Board of Education

Communications Department
Peel Board of Education

Communications Department
Windsor Board of Education

Communications Department
Sudbury Board of Education

The Association also acknowledges the professional assistance of:
Sally Barnes, Vice President of the consulting firm Enterprise Canada.

PART I

1992 BUDGET COMMUNICATION PLAN

ONTARIO PUBLIC SCHOOL BOARDS' ASSOCIATION

1992 BUDGET COMMUNICATION PLAN

Purpose: To provide trustees with a framework for the communication plan to explain the board's financial situation and 1992 budget to internal and external audiences.

The target groups are:

RATEPAYERS

Objective: To provide the public with information about the budget and opportunities for public input.

Timelines: December through passing of the budget.

Method: Print ads - in December, 1991 ratepayers were invited to participate in our budget process through advertisements in community newspapers throughout the board's jurisdiction. These ads were supported by reminders in the regular weekly meeting ad in the same newspapers.

Anticipated Result: Budget briefs presented by ratepayers for consideration in the 1992 budget process.

Timelines: May/June

The board meets its legal requirement to publish audited financial statements in a board publication. This publication provides an overview of the budget and is distributed to all households in the board's jurisdiction. This publication is the only direct contact the board has with all ratepayers during any given year. It will also provide our first opportunity for wide distribution of trustees' names and phone numbers since the November, 1991 election.

Anticipated Result: Fulfilling the board's core value of open, honest communication with all stakeholders.

OPINION LEADERS
(parent organizations, community associations, seniors' groups, municipalities, libraries, federal and provincial elected representatives)

Objective: To provide accurate information to influence opinion leaders throughout the community during budget deliberations.

Timelines: During budget deliberations.

Method: Special board publications to be released. Each will highlight the dates of various meetings in the budget process and describe budget issues, pressures and concerns. In the past, several community newspapers have re-printed the financial data and provided wider distribution of information at no cost to the board.

PART II

1991/92 BUDGET COMMUNICATION STRATEGIES

ONTARIO PUBLIC SCHOOL BOARDS' ASSOCIATION

1991/92 BUDGET COMMUNICATION STRATEGIES

In order to effectively communicate budget information, the message must be repeated continually before, during and after the budget deliberation process. It is also critical for employees, as well as community members to understand budget pressures and difficulties. Following are suggested communication strategies for the 1991/92 year.

Timelines for Budget Communication

FALL 1991

Internal (All Staff)

- Publications - Twice each month, all board employees receive a newsletter. Regular articles on the budget development process will be featured.
- Briefings - Sent to each school immediately following board meetings.
- Management Newsletter - This newsletter provides monthly budget updates to principals, vice principals and other managers. In addition, special updates are sent out following key board decisions and discussions.
- 1991 Tax Brochure - Copies are available in all schools for staff or community information.
- The annual report (featuring the budget) is available in all schools.
- Staff Involvement - Expanded Director's Council participates in the entire budget process and discussions.

External

- 1991 Tax Brochure - Copies are available for public meetings.
- Budget Briefings - Sent to community leaders following every board meeting reflecting budget discussions and decisions.
- Media Information - Provide all media with background information about the budget. As needed, consider calling press briefing sessions.
- Tax Bill Inserts.

Messages

- Explain budget pressures, including federal and provincial downloading.
- Outline 1991 and 1992 budget concerns.
- Explain process for 1992 budget development.
- Explain opportunities for involvement.

WINTER 1992

Internal

- Staff involvement.

External

- Articles for school/community newsletters.
- Media information.
- Media briefing sessions.
- Public meetings.

Messages

- Explain preliminary budget.
- Explain budget process and timelines.
- Outline work of strategic planning, organizational renewal and the budget impact.
- Outline budget pressures.

SPRING/SUMMER 1992

Internal

- Tax Brochure - 1992 budget.
- Staff meetings.

External

- 1992 Tax Brochure.
- Media information.
- 1991/92 Annual Report.
- Articles for school/community newsletters.
- Public meetings (video, overheads, fact sheets).

Messages

- Explain results of 1992 budget deliberations.
- Outline the effect on local ratepayers.
- Explain budget pressures, rationale.
- Outline cost saving efficiency measures.

PART III

SOME SUCCESSFUL BUDGET STRATEGIES & TIPS

SOME SUCCESSFUL BUDGET STRATEGIES & TIPS

The budget deliberation process provides professional communicators with a unique opportunity to "tell their story to their many publics." The budget, with its potential for communicating the school system's approach to managing the educational enterprise, can be the foremost public relations tool in any system.

Here are some suggestions to help professional communicators capitalize on the PR opportunity ...

1. The official budget document is your opportunity to tell your story clearly and compellingly. Therefore a school system should examine carefully the format of the document. Is it easily read? Is it comprehensible to someone who doesn't have an MBA? Does it incorporate a lot of education jargon?

   Ideally, a board should develop a budget document that not only tells the public where the money comes from but one that clearly, and in terms they can understand, tells them where the money goes to and what it does when it gets there.

   Each section of the budget document should be preceded by 2 - 4 pages of narrative which explains in simple, plain English the background for the requests, the objectives of the various programs and any proposed changes for the coming year from previous years.

2. Trustees should be in-serviced ahead of the actual budget deliberation meetings, as to the specifics of the administration's budget proposal. Given this advance opportunity to review proposals ahead of the deliberation process may effectively quell some negative and potentially damaging reactions on their part, before going into public session.

3. The media should be in-serviced ahead of time as well. This will give them an opportunity when they are not racing to meet a deadline, to more fully comprehend what the administration is proposing.

4. Public input should be encouraged and actively sought. Place an ad in your community newspaper asking for ideas and suggestions and publicize the deliberation meeting times and dates on cable and radio. An informed public is a more active and a more supportive public. Don't forget your internal public. Keep staff well informed on the proposed budget and seek their input especially in terms of cuts.

5. Once the budget is passed and the mill rate calculated, hold a debriefing session with the media to clarify alterations to the budget and also to explain carefully the mill rate implications in easy to understand terms.

PART IV

COMMUNICATING THE BUDGET: TIPS FOR WINNING PUBLIC SUPPORT

ONTARIO PUBLIC SCHOOL BOARDS' ASSOCIATION

COMMUNICATING THE BUDGET: TIPS FOR WINNING PUBLIC SUPPORT

BUILD IN OPPORTUNITIES FOR PUBLIC INVOLVEMENT AND INPUT

Parents and other community members need opportunities to learn more about the budget and offer ideas and comments. As one philosopher said, "When people own a piece of the rock they are invested." We need to help the public become invested in education. They need to have a chance to ask questions and have their views heard.

RESEARCH SHOWS THAT AN AUDIENCE NEEDS TO HEAR A MESSAGE AT LEAST TWELVE TIMES BEFORE THEY DEVELOP AN AWARENESS OR UNDERSTANDING

When communicating budget information, that means that one article or presentation will not be enough to build public support. Use a variety of communication strategies: brochures, community and parent newsletters; annual report; media releases and interviews; prepared articles for community and school newsletters; provide budget presentations to parent, ratepayer and community group meetings; employee newsletters; fact sheets available at municipal buildings; articles in the continuing education brochure.

THE MEDIA WILL PLAY A BIG ROLE IN BUDGET COMMUNICATION

Like it or not, local newspapers will carry play by play descriptions of the budget development. While you can not control the media, a board can certainly take steps to manage the relationship with the media.

- Don't wait for a crisis to develop a relationship with the media. Meet with media representatives on an ongoing basis. In the midst of heated budget debate, it's too late to build trust and understanding.

- Don't wait for the media to come to you. Go on the offensive with your budget stories. Provide the media with a background session on the budget; make complete budget materials available as early as possible. Before the budget process is in full swing, offer the media a relaxed opportunity for a question and answer session on budget development.

- Designate a media spokesperson, someone who will be readily accessible to answer questions and provide comment.

- Treat all media representatives equally and don't play favourites with reporters that you believe may write a more positive story. Be open and truthful with all media inquiries.

BE OPEN, HONEST AND NON-DEFENSIVE IN ALL BUDGET COMMUNICATION

Share the good news as well as the bad. The public will assume that the board manages its finances the same way it communicates. In other words, if the public perceives the board is not truthful, they will be concerned about how wisely the tax dollars are spent. A board earns trust and support when the public believes that communication (and management) is up front and honest.

DON'T LEAVE COMMUNICATION TO CHANCE

Develop and adopt a year long budget communication plan. Make sure that the plan is not an orphan, without anyone to care and tend for it. Assign the communication responsibility to one person.

During the budget process, public attention focuses on education. Through planned communication, use this opportunity to turn public attention into public understanding and support.

PART V

MEDIA AND EDUCATION FINANCE ISSUES: BUILDING BRIDGES

ONTARIO PUBLIC SCHOOL BOARDS' ASSOCIATION

MEDIA AND EDUCATION FINANCE ISSUES: BUILDING BRIDGES

The road to winning public support for board decisions relating to spending is made easier by building bridges of cooperation and understanding with the media and other levels of government. How many times has your municipal council raked your board over the coals for overspending and increasing local taxes? What about your MPPs and MPs? Do community and ratepayer groups applaud tough decisions of the board related to spending priorities or hurl accusations of overspending?

The November election has increased media interest in all aspects of board decisions and functions and individual actions of trustees, especially those that involve taxpayers' money will intensify. It is important that the credibility of your school system and the integrity of your school board as a public institution remain in good standing in the post-election era.

DEVELOP A MEDIA RELATIONS POLICY

Have an effective media relations policy in place to communicate your budget and other financial issues and decisions to the public. Remember that the average reporter does not understand the complexity of issues, especially education finance any better than the average ratepayer. Do your best to assist reporters and editors of your local media outlets because the mass media is the most influential means of communicating with your public. It's smarter to help a reporter understand the story than to try to correct the mistakes once they get broadcasted or printed. When it comes to spending, draft a media release setting out the budget highlights in simple, understandable terms. Make sure your spokesperson (board chair or finance chair or director) is prepared to answer follow-up questions and provide interviews.

WORK WITH YOUR MUNICIPAL COUNCIL

Establish a good liaison with your municipal council. While there is a traditional competition between councils and school boards, it is to the board's advantage to have councillors and municipal staff who understand the local education budget. A good relationship between the two bodies may result in an agreement by council to include the board's budget fact sheet or pamphlet in the municipal tax bill mailing. Councillors are less apt to bad mouth the trustees if they understand how the education mill rate is set. For example, explain the parts of the budget which are consumed by programs and services mandated by the province (smaller class sizes, employee health tax, pay equity, etc.)

WORK WITH YOUR PROVINCIAL AND FEDERAL REPRESENTATIVES

A working relationship with MPPs and MPs is a good investment. What these people think about the local public schools can affect public opinion - and your effectiveness in lobbying for grants. Provincial and

federal politicians are less likely to lash-out against school boards and school systems if reasonable attempts are made to involve them in solving problems and issues which confront the school system. When tackling broader social problems which challenge schools, such as violence, drug abuse, child abuse, racism and sexism, invite your MPPs and MPs to sit as observers on advisory committees or task forces aimed at developing board policies or proactive strategies for dealing with social issues in schools.

WORK WITH THE COMMUNITY

Community outreach is important. The public school system needs more cheerleaders and budget time offers an ideal opportunity for trustees and senior staff to participate in media interviews (talk shows, phone-in shows, etc.), public speaking opportunities with local service clubs, business and professional associations, cultural groups, home and school associations, senior citizens' organizations, etc. Many of these groups are in great need of public speakers for their regular or special meetings. Using the excuse of explaining how your local schools are financed, take the opportunity to tell your ratepayers what a great job your local schools are doing for your community. Even better, invite these people into the schools so they can see for themselves. Invite your MPP, local publisher, etc. Good news travels fast!

BE THOROUGH

Answer your critics and encourage your supporters. Don't let unfair or inaccurate criticism go without comment. News reports, letters to the editor, editorial comments, accusations by other elected officials, teachers' representatives etc. that are not responded to are automatically considered by the public to be correct. Encourage your supporters to speak out, as well. Official board responses will be seen to be the opinions of vested interests. Parents, business people, students and community leaders who speak out in support of your school system will have an especially positive effect on public opinion.

BE POSITIVE

Always direct your comments to how your system is serving its students. Educators too often fall into the trap of talking about policies and services, GLGs, and capital programs and forget to relate this to how they benefit the students involved. If a critic challenges the costs of ESL, talk about the individual kids you have dealt with who would be left behind if such programs were not available. Volunteer that special education costs more but remind the public of the extraordinary services being provided to young people who in earlier generations would be locked away and denied such opportunities. Relate everything to students and their families and the community as a whole.

HAVE YOUR HOME IN ORDER

Carefully scrutinize all your board policies and expenditures. Do nothing, support nothing and advocate nothing that will embarrass you or your board if it is reported on page one of your local newspaper. Expense

accounts, out of town conferences, meal policies, money spent on administration facilities and anything else the public might consider a "frill" will be closely monitored by your local media and critics. Millions of dollars spent or saved on carefully crafted programs will go unnoticed and unreported; a few hundred dollars on a junket or meal or conference that has not been properly connected to professional development has the potential of making page one and dragging down the board and the school system's image.

AVOID MUD SLINGING

Think twice before you try to grab an easy headline or ingratiate yourself to a reporter by attacking a colleague on the board or someone else in the political arena. We all live in glass houses. Similarly, while it's fair to point out the shortfall in support for education by the federal and provincial governments, remember that the public is sick of buck passing. The taxpayers care not which government's hand is removing the money. All they know and care about is that there is little left these days when all levels of government get through with them. Be proactive. Instead of being negative about others, be positive about what your board is doing for the young people and the future of your community.